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Home Textiles

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Home Textiles

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E. B. Gold, Manager
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HOME TEXTILES

Market Trends

One of the greatest stimulants for the industry in recent years has been the need to conserve energy and to keep warm with lowered thermostats. This has been felt in the market for window treatment products, fostering a demand for draperies with thermal linings and other energy-saving products, as well as in the market for bedcoverings with special properties.

Electric blankets are one of the most successful items in the energy-related boom. In 1979, 5.9 million units were sold at retail, exceeding sales of every blanket category except the lower priced nonwoven needlepunch type which reportedly hit about 19 million units. Synthetic thermals reportedly reached 4 million units; cotton thermals, 420 thousand units; blanket sacks or body wraps, 120 thousand units; sheet blankets, 4 million units; flocks, 1.3 million units; and high pile throws, 500 thousand units.

Comforters which have the versatility of serving as a bedspread by day and a blanket by night, saw increased sales of approximately 2.0% in 1979. According to the Wool Bureau, 250 thousand wool-filled comforters were sold during the '79 winter season.

The body wrap, still considered by some to be a passing fad, is now in its fourth year. Unit sales for the 1980 winter season are anticipated at about 5 million units.

New window treatments finding acceptance are the vinyl mini-blinds and insulating shades, as well as the thermal-lined draperies.

Other types of home textiles have shown gains due to fashion developments and changing consumer tastes. Greater interest in natural fibers, for example, has stimulated interest in all-cotton towels and sheets. While opinion is divided on the importance of designer names in merchandising home textiles, the industry must meet the need for constant change and development of new designs and colors.

While prints make up the bulk of sheet sales, interest in solid colors, as well as in white sheets, has been growing. Solid colors accounted for close to 10% of manufacturers' shipments of sheets in 1978, up from 8.4% in 1977 and at the present are probably well over 10% in view of consumer acceptance of the new deeper shades.

Towels have become an increasingly popular item in the domestics market, with sales moving steadily upward. Improved profit margins are leading retailers to feature towels in special promotions and bath shop areas. Demand is noted not only for all-cotton towels but for new fashion colors and tones.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

Every five years the U.S. Bureau of the Census conducts a complete census of all business activities in the U.S. Results of the most recent census of manufactures, covering operations in the year 1977, are now being released, and the following summarizes key findings compared with 1972 census counts. (In interim years, the Census Bureau conducts annual surveys of manufactures, which result in published estimates based on a representative sample of establishments. These estimates may differ from results of a complete canvass of all establishments and are, therefore, not included in the following industry data).

In 1977 there were a total of 980 companies primarily involved in the manufacture of home textiles from purchased fabrics, down from 1,058 companies reported in 1972. A total of 1,650 companies were primarily involved in the manufacture of curtains and draperies, representing a gain of 7.1% over the 1972 total of 1,540.

Not included in these figures are manufacturers who make home textiles as secondary products, and weaving and knitting mills who make home textile products from their own materials.

In evaluating the size of the industry, it must also be kept in mind that a very significant portion of the home textiles market consists of custom-made products. Because of the close relationship of hardware, blinds and shades, in the merchandising of textile window treatment lines, data on this classification has been included.

Curtains & Draperies
(SIC 2391)*

	1977	1972	% Change 1977/1972
Number of companies	1,650	1,540	+ 7.1%
Number of establishments**	1,712	1,593	+ 7.5
Employees, total (thous.)	31.7	33.9	- 6.5
Production workers (thous.)	27.2	29.5	- 7.8
Payroll (mil. $)	$ 224.7	$ 167.1	+34.5
Value added by manufacture (mil. $)#	407.3	302.3	+34.8
Value of shipments (mil. $)##	1,013.1	754.9	+34.2
Capital expenditures, new (mil. $)	7.2	9.5	-24.2

GENERAL STATISTICS ON THE INDUSTRY

Home Textiles Not Elsewhere Classified (SIC 2392)*

	1977	1972	% Change 1977/1972
Number of companies	980	1,058	- 7.4%
Number of establishments**	1,051	1,111	- 5.4
Employees, total (thous.)	47.5	50.3	- 5.6
Production workers (thous.)	39.8	42.2	- 5.7
Payroll (mil. $)	$ 366.4	$ 281.9	+30.0
Value added by manufacture (mil. $)#	782.9	585.2	+33.8
Value of shipments (mil. $)##	2,294.0	1,526.9	+50.2
Capital expenditures, new (mil. $)	26.9	29.9	-10.0

Drapery Hardware & Blinds & Shades (SIC 2591)*

	1977	1972	% Change 1977/1972
Number of companies	435	493	-11.8%
Number of establishments**	456	505	- 9.7
Employees, total (thous.)	13.6	12.1	+12.4
Production workers (thous.)	10.3	8.7	+18.4
Payroll (mil. $)	$ 145.6	$ 94.4	+54.2
Value added by manufacture (mil. $)#	345.0	198.2	+74.1
Value of shipments (mil. $)##	675.1	364.5	+85.2
Capital expenditures, new (mil. $)	16.7	9.9	+68.7

n.e.c. = not elsewhere classified

*SIC (Standard Industrial Classification) covers establishments primarily engaged in manufacturing curtains and draperies from purchased materials.

*SIC 2392 (officially designated "House Furnishings, n.e.c.") covers establishments primarily engaged in manufacturing home textiles from purchased materials, including towels, sheets, blankets, comforters, bedspreads, pillowcases, pads; also slip covers, tablecloths (fabric and plastic), pillows, mops, garment bags, etc. Blankets that are made in weaving mills are not included in this industry, nor are tufted bath mats or other tufted items.

*SIC 2591 covers establishments primarily engaged in manufacturing curtain and drapery rods, poles and fixtures, venetian blinds and other window blinds and shades, regardless of the materials used, except canvas shades and awnings.

**Each business location is counted as a separate establishment.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

(continued)

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes all items made by companies in this industry classification, including secondary products. It also includes miscellaneous income, receipts for contract work, etc. For the total value of shipments of household textiles made in SIC 2392 as well as in other industries, see tables on page 5 & 6. (Blankets made in weaving mills are an example of household textiles not included in the value of shipments of Industry 2392)

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-1-23E,
MC77-1-25B.

Employment

The effect on the home textiles industry of the sharp downturn in the construction of new housing and the general recession in the U.S. economy in 1980 is apparent in U.S. Bureau of Labor Statistics data on employment levels. Preliminary figures for the month of June 1980 indicate a decline of 8.2% in production worker employment compared with the same month a year ago in the curtain and drapery industry, and a 4.7% drop in other types of home textiles.

GENERAL STATISTICS ON THE INDUSTRY

Employment

Employment & Earnings in Home Textiles

	Monthly Average		%	Annual Average		%
	June 1980(p)	June 1979	Chg.	1979	1978	Chg.
Curtains & draperies (SIC 2391)*						
All employees (thous.)	27.8	29.4	-5.4%	30.2	30.8	-1.9%
Production workers (thous.)	23.4	25.5	-8.2	26.2	26.9	-2.6
Av. weekly earnings	$147.38	$145.13	+1.5	$139.88	$127.33	+9.9
Av. weekly hours	36.3	38.7	-6.2	37.3	36.8	+1.4
Home textiles, n.e.c. (SIC 2392)*						
All employees (thous.)	51.3	54.4	-5.9	51.8	51.6	+0.4
Production workers (thous.)	42.1	44.2	-4.7	43.2	42.9	+0.7
Av. weekly earnings	$164.35	$158.30	+3.8	$160.93	$148.99	+8.0
Av. weekly hours	37.1	38.8	-4.4	38.5	38.3	+0.5

(p) = preliminary
n.e.c. - not elsewhere classified

*Manufacturers are classified by industry under the Standard Industrial Classification system (SIC), determined by the principal product made. See previous footnotes for the industry definitions.

While relatively few plants operating in the home textiles classifications have 100 or more employees, these plants account for upwards of 60% of the total value of shipments, according to the U.S. Bureau of the Census and trade sources.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

GENERAL STATISTICS ON THE INDUSTRY

Employment

Manufacturers of Home Textiles by Employment Size, 1977

	Curtains & Draperies (SIC 2391)*		Home Textiles, n.e.c. (SIC 2392)*		Drapery Hardware & Blinds & Shades (SIC 2591)*	
	No.	%	No.	%	No.	%
Total establishments**	1,540	100.0%	959	100.0%	423	100.0%
Number by employment size:						
1 to 9	1,008	65.5	439	45.8	297	70.2
10 to 19	238	15.5	150	15.6	56	13.3
20 to 49	181	11.7	169	17.6	29	6.9
50 to 99	63	4.1	85	8.9	17	4.0
100 to 249	33	2.1	84	8.7	9	2.1
250 to 499	13	0.8	25	2.6	9	2.1
500 or more	4	0.3	7	0.7	6	1.4

n.e.c. = not elsewhere classified.
* For definitions of SIC codes, see page 3.
** Includes only establishments with payrolls.

Source: U.S. Bureau of the Census, County Business Patterns, 1977.

Employment & Share of Shipments of Home Textiles in Large Plants - 1978, 1979

	Number of Plants		% of Total Shipments
	With 20+ Employees	With 100+ Employees	Accounted for by Plants With 100+ Employees
Curtains & draperies (SIC 2391)*			
1978	327	75	60%
1979(e)	347	77	60
Home textiles, n.e.c. (SIC 2392)*			
1978	337	100	65%
1979(e)	354	102	65
Drapery hardware & blinds & shades (SIC 2591)*			
1978	110	23	73%
1979(e)	122	24	73

n.e.c. = not elsewhere classified
* For definitions of SIC numbers, see page 3.

Source: Sales & Marketing Management, "Survey of Industrial Buying Power," 1979 & 1980 editions. (All rights reserved.)

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Key Business Ratios in the Home Textiles Industry, 1978
(Median Results)

	Curtains & Draperies (SIC 2391)*	Home Textiles, n.e.c. (SIC 2392)*	Drapery Hardware & Blinds & Shades (SIC 2591)*
Number of firms reporting	190	174	68
Current assets to current debt (times)	2.37	1.89	2.35
Net profits on net sales (percent)	3.94	2.85	4.14
Net profits on net worth (percent)	20.35	20.84	29.50
Net sales to net worth (times)	5.01	5.55	5.56
Net sales to net working capital (times)	6.11	7.33	6.07
Average collection period (days)	32	36	34
Net sales to inventory (times)	10.0	7.7	10.0

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
1979 Key Business Ratios.
(All rights reserved.)

*For definitions of SIC numbers, see page 3.

GENERAL STATISTICS ON THE INDUSTRY

By Region

Home Textiles Industry
By Geographic Region and Leading States, 1977

	Number of Establishments		Value of Shipments	
	Total	20 or More Employees	Mil. of $	% of Total**
Curtains & draperies (SIC 2391)*				
Total U.S.	1,712	324	$1,013.1	100.0%
New England				
Massachusetts	49	28	98.8	9.7
Connecticut	10	4	15.5	1.5
Middle Atlantic				
New York	175	41	163.3	16.1
New Jersey	39	5	16.5	1.6
Pennsylvania	70	18	36.5	3.6
East North Central				
Ohio	47	11	17.1	1.7
Indiana	39	12	44.9	4.4
Illinois	80	7	16.0	1.6
Michigan	31	5	5.8	0.6
Wisconsin	20	3	6.0	0.6
West North Central				
Minnesota	26	5	10.8	1.1
Missouri	29	6	9.1	0.9
South Atlantic				
Maryland	18	2	4.2	0.4
West Virginia	5	2	(D)	--
North Carolina	33	17	140.0	13.8
South Carolina	21	7	26.9	2.6
Georgia	35	14	52.0	5.1
Florida	133	8	23.8	2.3
East South Central				
Tennessee	17	4	(D)	--
Alabama	13	2	7.4	0.7
West South Central				
Louisiana	13	2	4.9	0.5
Oklahoma	21	5	19.3	1.9
Texas	109	17	75.2	7.4
Mountain				
Idaho	7	2	(D)	--
Arizona	30	4	6.5	0.6
Utah	18	3	3.7	0.4
Nevada	11	2	(D)	--
Pacific				
Washington	47	10	11.9	1.2
Oregon	32	7	11.3	1.1
California	389	56	110.5	10.9
Hawaii	7	2	4.5	0.4

(continued)

By Region

Home Textiles Industry
By Geographic Region and Leading States, 1977 (continued)

	Number of Establishments		Value of Shipments	
	Total	20 or More Employees	Mil. of $	% of Total**
Home textiles, n.e.c. (SIC 2392)*				
Total U.S.	1,051	403	$2,294.0	100.0%
New England				
Massachusetts	33	13	39.0	1.7
Connecticut	14	8	18.0	0.8
Middle Atlantic				
New York	272	85	356.2	15.5
New Jersey	62	31	141.7	6.2
Pennsylvania	54	21	65.0	2.8
East North Central				
Ohio	28	8	71.5	3.1
Indiana	17	7	21.6	0.9
Illinois	68	30	116.4	5.1
Michigan	19	2	6.0	0.3
West North Central				
Minnesota	11	8	16.3	0.7
Iowa	4	2	(D)	--
Missouri	15	7	15.5	0.7
South Dakota	7	4	(D)	--
Kansas	8	2	4.2	0.2
South Atlantic				
Maryland	12	3	6.0	0.3
Virginia	9	6	75.8	3.3
North Carolina	41	24	305.5	13.3
South Carolina	19	13	200.7	8.7
Georgia	44	27	287.0	12.5
Florida	34	11	14.6	0.6
East South Central				
Kentucky	10	5	(D)	--
Tennessee	11	6	20.9	0.9
Alabama	19	9	205.4	8.9
Mississippi	11	4	22.1	1.0
West South Central				
Oklahoma	8	3	29.3	1.3
Texas	35	11	33.8	1.5
Pacific				
California	123	39	145.3	6.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Home Textiles Industry
By Geographic Region and Leading States, 1977 (continued)

	Number of Establishments		Value of Shipments	
	Total	20 or More Employees	Mil. of $	% of Total**
Drapery Hardware & Blinds & Shades (SIC 2591)*				
Total U.S.	456	85	$675.1	100.0%
New England				
Rhode Island	5	1	(D)	--
Connecticut	10	3	(D)	--
Middle Atlantic				
New York	84	12	41.2	6.1
New Jersey	24	4	41.1	6.1
Pennsylvania	19	3	6.7	1.0
East North Central				
Illinois	25	6	(D)	--
Michigan	13	4	(D)	--
Wisconsin	5	4	(D)	--
South Atlantic				
Maryland	7	3	37.6	5.6
Virginia	10	3	7.6	1.1
Georgia	11	4	(D)	--
Florida	29	4	10.2	1.5
East South Central				
Kentucky	2	1	(D)	--
Tennessee	6	3	(D)	--
West South Central				
Texas	38	5	14.9	2.2
Mountain				
Utah	4	2	(D)	--
Pacific				
California	67	14	75.5	11.2

(D) = Withheld to avoid disclosing figures for additional companies.
n.e.c. = not elsewhere classified
* For full definitions of SIC numbers, see page 3.
** Percent distribution does not equal 100.0% due to disclosures.

Source: U.S. Department of Commerce,
Bureau of the Census,
1977 Census of Manufactures,
Industry Series.

PRODUCTION

The U.S. Bureau of the Census issues quarterly reports on production and shipments of sheets, pillowcases and towels, based on surveys among all U.S. firms engaged in the manufacture of these products from purchased fabrics, as well as from fabrics woven or knit by the same firm.

In the first half of 1980, production of sheets and pillowcases were ahead of output in the same 1979 period--sheets, up 7.5%; pillowcases, up 4.5%. Production of crib sheets lagged by 0.9%, and of terry towels (finished) by 1.6%.

For the year 1979, however, crib sheets showed a gain of 5.5% in output compared with the previous year, but remained far below the peak level reached in 1970. Production of flat sheets, which had registered a strong gain in 1978, lost ground in 1979, as did fitted sheets.

Output of terry woven towels (finished) for all used reached a record high of close to 52 million dozen in 1979, led by strong gains in production of terry woven kitchen towels. Output of huck and crash towels registered a sharp decline (-27.5%) between 1978 and 1979.

Production of Sheets, Pillowcases & Towels--1977, 1978, 1979
(In Thousands of Dozens)

	Quantity			% Change	% Change
	1979(p)	1978	1977	1979/1978	1978/1977
Sheets and pillowcases, total	30,809	31,190	30,866	- 1.2%	+ 1.0%
Crib-size sheets	695	659	632	+ 5.5	+ 4.3
Other sheets	15,861	16,804	16,284	- 5.6	+ 3.2
By type:					
Flat sheets	9,766	10,310	9,711	- 5.3	+ 6.2
Fitted sheets	6,095	6,494	6,573	- 6.1	- 1.2
Pillowcases, total	14,253	13,727	13,950	+ 3.8	- 1.6
Towels:					
Finished terry woven, total	51,732	49,256	46,283	+ 5.0	+ 6.4
By Type:					
Sheared	16,658	16,869	15,306	- 1.2	+10.2
Non-sheared	35,074	32,387	30,977	+ 8.3	+ 4.5
By kind:					
Kitchen	6,126	5,408	4,722	+13.3	+14.5
Bath size	24,460	22,379	21,238	+ 9.3	+ 5.4
Hand, face, quest, fingertip	18,576	18,498	17,238	+ 0.4	+ 7.3
All other including larger than bath (e.g., queen/king bath towels, bath sheets, bath mats)	2,569	2,971	2,907	-13.5	+ 2.2
Huck and crash towels, incl. dish towels	49,141	67,747	69,797	-27.5	- 2.9
Terry washcloths	22,987	24,940	24,091	- 7.8	+ 3.5
Terry cloth sold by the yard	24,572*	29,077*	24,067	-15.5	+20.8

(p) = preliminary
* In thousands of linear yards

Source: U.S. Bureau of the Census (and The American Textile Manufacturers' Institute), Current Industrial Reports, Sheets, Pillowcases & Towels MQ-23X.

Summary of Production of Sheets, Pillowcases & Towels, 1968-1979
(In Thousands of Dozens)

Year	Sheets			Pillowcases	Terry Woven Towels (Finished)
	Crib	Flat	Fitted		
1979(p)	695	9,766	6,095	14,253	51,732
1978	659	10,310	6,494	13,727	49,256
1977	632	9,711	6,573	13,950	46,283
1976	732	9,836	6,968	13,964	45,556
1975	683	9,092	6,344	12,337	41,442
1974	691	10,093	5,701	13,755	42,153
1973	686	10,044	6,404	14,381	47,558
1972	1,028	10,345	7,213	14,116	47,675
1971	1,198	9,510	6,586	13,381	45,319
1970	1,327	9,029	6,503	13,768	46,599
1969	1,141	8,217	5,835	12,842	47,039
1968	894	9,271	5,759	13,432	48,863

(p) = preliminary

Source: U.S. Bureau of the Census (and The American Textile Manufacturers' Institute), Current Industrial Reports (MQ-23X).

Production of Sheets & Pillowcases by Fabric Type, 1978, 1979
(In Thousands of Dozens)

	1979(p)		1978	
	Quantity	Percent	Quantity	Percent
Flat sheets	9,766	100.0%	10,310	100.0%
Polyester/cotton blends:				
Less than 180 count	5,272	54.0	5,462	53.0
180 count & greater	4,268	43.7	4,618	44.8
All other fabrics	226	2.3	230	2.2
Fitted sheets	6,095	100.0	6,494	100.0
Polyester/cotton blends:				
Less than 180 count	3,203	52.6	3,460	53.3
180 count & greater	2,737	44.9	2,877	44.3
All other fabrics	155	2.5	157	2.4
Pillowcases	14,253	100.0	13,727	100.0
Polyester/cotton blends				
Less than 180 count	7,345	51.5	7,033	51.2
180 count & greater	6,586	46.2	6,340	46.2
All other fabrics	322	2.3	354	2.6

(p) = preliminary

Source: U.S. Bureau of the Census (and The American Textile Manufacturers' Institute), Current Industrial Reports (MQ-23X).

PRODUCTION

Current data on production of other types of home textiles, not covered in U.S. Bureau of the Census reports, is available from the National Cotton Council of America. Following are estimates on total production (all types of fabrics) for the years 1978 and 1979 from this source. (It should be noted that the Census Bureau covers detailed information on product shipments in the 1977 census of manufactures reports. See the section on SHIPMENTS.)

Production of Selected Home Textiles, by Type—1978, 1979

	Unit of Measure	1979(p)	1978	% Change 1979/1978
Curtains, excluding shower	1,000 sets	124,769	122,396	+ 1.9
Lace		1,464	1,509	- 3.0
Other		123,305	120,887	+ 2.0
Cafe, tiered & cottage		67,913	66,581	+ 2.0
Ruffled		5,971	5,854	+ 2.0
Shortie drapes		12,618	12,371	+ 2.0
Tailored		36,803	36,081	+ 2.0
Drapery, upholstery & slip cover fabrics	1,000 lin. yds.	948,275	952,760	- 0.5
Drapery fabrics		545,585	557,966	- 2.2
Mainly woven		470,332	481,005	- 2.2
Lining, woven		75,253	76,961	- 2.2
Upholstery & slip covers fabrics		402,690	394,794	+ 2.0
Coated		88,592	86,855	+ 2.0
Knit		25,692	25,188	+ 2.0
Woven		62,800	61,667	+ 2.0
Uncoated, woven		314,098	307,939	+ 2.0
Window shades, woven, plastic & non-woven	1,000 units	49,682	53,422	- 7.0
Slip covers, furniture, excluding plastic	1,000 units	9,278	10,915	-15.0
Comforters & quilts	1,000 units	14,025	12,344	+13.6
Bedspreads	1,000 units	40,056	39,091	+ 2.5
Tailored		19,263	18,793	+ 2.5
Tufted		10,799	10,484	+ 3.0
Woven		9,994	9,814	+ 1.8
Jacquard		7,163	7,092	+ 1.0
Other woven		2,831	2,722	+ 4.0
Mattress coverings, woven & plastic	1,000 units	3,237	3,205	+ 1.0
Pads, quilted, excluding fillings	1,000 units	41,115	39,728	+ 3.5
Bassinet & crib, woven & plastic		5,856	5,798	+ 1.0
Furniture, woven		6,720	6,222	+ 8.0
Mattress, woven		28,539	27,708	+ 3.0
Pillows & cushions, excluding fillings, woven	1,000 units	60,371	58,918	+ 2.5
Bed		37,684	37,311	+ 1.0
Decorative		22,687	21,607	+ 5.0

(continued)

Production of Selected Home Textiles, by Type—1978, 1979
(continued)

	Unit of Measure	1979(p)	1978	% Change 1979/1978
Tablecloths & napkins, excluding linen & unsupported plastic	1,000 sq. yds.	109,061	105,884	+ 3.0
Damask, woven		15,998	15,993	*
Lace		16,426	16,642	- 1.0
Other woven		76,587	73,249	+ 4.6
Coated		23,742	22,707	+ 4.6
Uncoated		52,845	50,542	+ 4.6

(p) = preliminary
* = less than 0.1%

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

Production of blankets is estimated on the basis of yardage in blanketing reported by U.S. mills.

Estimated Production of Blankets in the U.S.—1977, 1978

	Units* (in thous.) 1978	1977	% Change 1978/1977
Production of blankets, total**	82,814	83,928	- 1.3
Wholly or chiefly wool	1,770	1,609	+10.0
Crib, thermal and other	na	5,409	--
Canton flannel	18,864	17,984	+ 4.9
Wholly or chiefly synthetic***	31,090	29,463	+ 5.5
Acrylic & modacrylic	18,425	17,817	+ 3.4
Polyester	12,665	11,646	+ 8.7

na = not available
*Units were estimated based on production of blanketing reported in yardage and assuming 2.4 linear yards per blanket.
**Includes other napped fabrics
***Includes woven and non-woven blanketing

Source: Based on U.S. Bureau of the Census Current Industrial Reports on Broadwoven Fabrics (Gray), Series, MQ-22T(78)-5.

PRODUCTION

Preliminary figures for the year 1979 on domestic production of blankets, in terms of linear yards, have been published by the National Cotton Council of America and are shown below, together with comparisons for 1978.

Production of Blankets & Blanketing, 1978; 1979
(Thousands of linear yards)

	1979(p)	1978	% Change
Blankets & blanketing, total	88,802	96,663	-8.1%
Bed	80,554	87,660	-8.1
Thermal woven	20,291	21,626	-6.2
Other woven & nonwoven	60,262	66,034	-8.7
Crib & receiving	8,248	9,003	-8.4
Thermal woven	1,038	1,137	-8.7
Other woven & nonwoven	7,210	7,866	-8.3

(p) = preliminary

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

MATERIALS CONSUMED IN PRODUCTION

The 1977 census of manufactures report on the home textiles industry included quantity and cost of materials consumed or put into production by plants classified in this industry. Following are findings compared with the previous census data, covering the year 1972.

Materials Consumed by Kind: 1972, 1977

Industry	Unit of Measure	1977 Quantity (mils.)	1977 Delivered Cost (mil.$)	1972 Quantity (mils.)	1972 Delivered Cost (mil.$)
Curtains & draperies (SIC 2391)*					
Materials, containers, supplies, total	--	--	$ 542.5	--	$374.7
Broadwoven fabrics:					
Cotton	lin.yards	118.0	113.3	166.0	102.0
Rayon & acetate	" "	nr	85.8	117.4	74.7
Nylon	" "	nr	11.0	15.2	5.3
Polyester	" "	133.8	101.6	119.0	65.4
Other	" "	55.2	41.4		
Plastics	--	nr	1.1	nr	nr
All other materials, containers, etc.	--	--	40.1	--	29.7
Type not specified	--	--	148.2	--	97.6
Home textiles (SIC 2392)*					
Materials, containers, supplies, total	--	--	1,392.6	--	863.2
Broadwoven fabrics:					
Cotton	lin.yards	480.1	401.9	603.6	307.9
Rayon & acetate	" "	82.9	33.3	87.5	46.0
Nylon	" "	87.9	25.3	15.8	5.8
Polyester	" "	412.1	327.5	177.9	121.6
Other	" "	61.3	61.9		
Plastics coated, impregnated or laminated fabs.	" "	75.4	57.9	49.9	29.3
Man-made fibers (staple & tow)	pounds	97.7	33.3	44.7	20.9
Plastics products in the form of sheets, rods, etc.	--	nr	26.8	nr	nr
All other materials, containers, etc.	--	--	227.1	--	195.9
Type not specified	--	--	197.6	--	135.8

*See industry definitions on page 3.
nr = not reported.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series MC77-1-23E.

MATERIALS CONSUMED IN PRODUCTION

Consumption of all types of fibers in curtains, according to data compiled by the Textile Economics Bureau, came to 88.7 million pounds in 1978--almost 40% higher than the total reported five years earlier. Fiber consumption in draperies and upholstery, on the other hand, which totaled 599 million pounds in 1978, was 14% below the total reported for 1974.

In the five year period, fiber consumption in bedspreads and quilts was up 40.5%; in blankets, up 5.9%; in towels, up 23.1%; in sheets and other bedding, up 27%. Fiber consumption of other, miscellaneous household textiles held about even in this span.

Man-made fibers dominate in all end uses except sheets and towels. With growing consumer interest in natural fibers, and improved no-iron fabric characteristics, cotton is expected to increase its share of fiber consumption in sheets.

Contrary to expectations, gains have been registered in the use of rayon and acetate in the curtain, drapery and upholstery categories.

Consumption of Fibers in Selected Home Textiles--1977, 1978
(Millions of Pounds)

	1978	1977	% Change 1978/1977
Curtains, total[1]	88.7	74.2	+19.5%
Man-made fibers, total	78.1	62.2	+25.6
Rayon & acetate	22.8	18.3	+24.6
Other man-made fibers	55.3	43.9	+26.0
Cotton	10.6	12.0	-11.7
Drapery & Upholstery, total[2]	599.0	581.7	+ 3.0
Man-made fibers, total	389.7	366.6	+ 6.3
Rayon & acetate	181.3	160.2	+13.2
Other man-made fibers	208.4	206.4	+ 1.0
Cotton	193.2	201.7	- 4.2
Wool	16.1	13.4	+20.1
Bedspread & quilts, total[3]	158.1	153.9	+ 2.7
Man-made fibers, total	81.8	75.1	+ 8.9
Rayon & acetate	9.5	12.7	-25.2
Other mad-made fibers	72.3	62.4	+15.9
Cotton	76.3	78.8	- 3.2
Blankets & blanketing, total[4]	126.7	130.3	- 2.8
Man-made fibers, total	112.2	115.7	- 3.0
Rayon & acetate	0.1	0.2	-50.0
Other man-made fibers	112.1	115.5	- 2.9
Cotton	8.5	8.8	- 3.4
Wool	6.0	5.8	+ 3.4
Towels & toweling, total[5]	324.7	300.9	+ 7.9
Man-made fibers, total	28.0	27.6	+ 1.4
Rayon & acetate	--	0.2	--
Other man-made fibers	28.0	27.4	+ 2.2
Cotton	296.7	273.3	+ 8.6

(continued)

Consumption of Fibers in Selected Home Textiles--1977, 1978
(Millions of Pounds)
(continued)

	1978	1977	% Change 1978/1977
Sheets & other bedding, total[6]	524.4	526.4	- 0.4
Man-made fibers, total	237.0	242.6	- 2.3
Rayon & acetate	16.2	14.9	+ 8.7
Other man-made fibers	220.8	303.1	-27.1
Cotton	287.4	283.8	+ 1.3
Miscellaneous household textiles, total 7	58.5	52.6	+11.2
Man-made fibers, total	29.3	25.2	+16.3
Rayon & acetate	4.0	1.7	+135.3
Other man-made fibers	25.3	23.5	+ 7.7
Cotton	29.2	27.4	+ 6.6

1. Lace, ruffled, cottage, cafe and tiered types included.
2. Includes furniture slipcovers, vinyl-coated fabrics for upholstery and olefin and saran webbing for outdoor furniture. Also includes the backing and headers of various drapery fabrics.
3. Includes tailored and throw spreads, both tufted and woven, as well as the backing of those goods.
4. Includes woven, knitted, needle-punched and flocked full-sized and crib blankets and electric blanket shells as well as the woven acetate or nylon filament yarn bindings. Sizable poundages of rayon, acrylic, nylon and wool waste are also included.
5. Includes woven hand, bath, dish and other towel types.
6. Sheets includes pillowcases. Other bedding includes the outside cover of quilted pads, mattress pads, mattresses and innersprings, cots and sleeping bags.
7. Includes woven and lace napery, such as tablecloths, napkins and doilies; oil cloth, shower curtains, window shades and stamped art goods for embroidery. Also includes man-made fibers used in radio and television grille cloth and insect screening and netting.

Source: Textile Economics Bureau, Inc.,
Textile Organon, (November 1979).

SHIPMENTS

The complete census of manufactures, compiled every five years by the U.S. Bureau of the Census and most recently covering the year 1977, indicates that the total value of shipments of all types of home textiles as covered in this Fact File is currently in the area of $6 billion. This includes shipments for import and the institutional market, as well as for the retail market.

Preliminary data on an incomplete list of product classifications thus far available from the 1977 census, compared with findings in the 1972 census, are shown below:

Value of Reported Shipments of Home Textiles by All Producers, 1972, 1977
(Millions of Dollars)

	1977	1972	% Change 1977/1972
Reported total*	$4,099.9	$2,862.2	**
Curtains & draperies, except lace	936.7	626.2	+ 49.6
Bedspreads & bedsets	400.3	312.5	+ 28.1
Sheets & pillowcases, total	906.3	634.8	+ 42.8
Made in weaving mills: chiefly cotton	--	77.8	--
Made in weaving mills: chiefly man-made fibers	426.8	238.5	+ 78.9
Made from purchased fabrics	479.5	318.5	+ 50.5
Blankets:			
Wool & chiefly wool	17.8	13.0	+ 36.9
Man-made & chiefly man-made fibers	(D)	41.6	--
Cotton & chiefly man-made fibers	(D)	13.5	--
Electric bedcoverings	(D)	44.4	--
Towels & washcloths	693.0	403.0	+ 72.0
Made in weaving mills	416.4	319.0	+ 30.5
Made from purchased fabrics	276.6	84.0	+229.3
Other home textiles (such as shower curtains, comforters & quilts, tablecloths, napkins, placemats, pillows, slip covers, mops & dusters, bags for laundry, shoes & wardrobe)	1,145.8	773.2	+ 48.2
(Shipments of related products, not included in the total)			
Drapery hardware, blinds & shades	329.7	160.4	+105.5
Window shades & accessories	140.3	80.9	+ 73.4
Venetian blinds	89.6	29.1	+207.9
Other & types not specified	45.7	40.9	+ 11.7

*It should be noted that unspecified products, such as bath mats and rugs made in floor covering mills, are not included in this listing.
**Not shown as totals are not comparable due to (D).
(D) Withheld to avoid disclosure of operations of individual companies.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series and Preliminary Reports.

SHIPMENTS

Updated information on shipments of sheets and pillowcases, towels and washcloths, is issued by the U.S. Bureau of the Census in the quarterly Current Industrial Reports. The 1977 total reported in the CIR differs somewhat from that reported in the 1977 complete census of manufactures, since the CIR is based on a sample survey. The CIR reported total value of shipments of sheets and pillowcases in 1977 at $878.6 million (compared with $906.3 million in the Census); towels and washcloths (woven), at $698.4 million (compared with $693.0 million).

In order to provide the latest available information, and the detailed data provided in the CIR reports, the following table is based on that source.

Quantity & Value of Shipments by All Producers, 1977-1979

	Quantity (Thous. dozens)			Value (Mil.$)		
	1979(p)	1978	1977	1979(p)	1978	1977
Sheets and pillowcases	31,217	32,089	31,160	$993.8	$946.4	$859.2
Crib size sheets	662	650	655	15.7	13.1	13.0
Total sheets	16,296	16,859	16,624	760.3	725.7	661.0
By type:						
Flat sheets	9,981	10,169	9,821	462.3	437.2	392.9
Polyester/cotton blends:						
Less than 180 count	5,445	5,640	5,468	215.6	208.5	186.9
180 count and greater	4,338	4,355	4,185	235.5	220.2	198.1
All other fabrics	198	174	168	11.3	8.5	7.9
Fitted sheets	6,315	6,690	6,803	297.8	288.5	268.1
Polyester/cotton blends:						
Less than 180 count	3,301	3,650	3,787	135.3	137.8	127.4
180 count and greater	2,886	2,938	2,906	154.9	144.9	135.6
All other fabrics	128	102	110	7.6	5.9	5.2
By size:						
King	1,129	1,124	1,057	91.4	85.7	75.8
Queen	1,985	2,004	1,861	134.1	123.9	105.6
Full	6,484	6,834	6,803	292.8	285.2	263.8
Twin	6,274	6,380	6,517	229.3	215.5	205.1
Single and smaller	424	317	386	12.5	15.4	10.7
Sheets (except crib) shipped for export	1,478	1,353	1,381	60.3	51.6	49.0
Pillowcases	14,259	14,578	13,881	217.9	207.7	185.2
Polyester/cotton blends:						
Less than 180 count	7,217	7,520	7,353	94.2	91.5	84.9
180 count and greater	6,654	6,687	6,206	117.0	109.9	95.7
All other fabrics	388	371	322	6.6	6.3	4.5
Finished terry woven towels	51,654	50,245	47,083	756.9	660.9	575.3
By type:						
Sheared	16,558	16,866	15,540	306.5	248.2	238.0
Nonsheared	35,096	33,379	30,982	450.3	412.7	337.4
By end use:						
Kitchen	6,029	5,281	5,142	33.1	26.8	22.9
Bath	24,654	22,815	21,533	471.9	401.5	355.1
Hand, face, guest, and fingertip	18,315	19,012	17,761	186.9	175.5	149.1
Bath/tub mats						
All other types, incl. larger than bath (queen/king size bath towels, bath sheets, and beach towels)	2,656	3,137	2,647	65.0	57.1	48.1

(continued)

SHIPMENTS

Quantity & Value of Shipments by All Producers, 1977-1979 (continued)

	Quantity (Thous. dozens)			Value (Mil.$)		
	1979(p)	1978	1977	1979(p)	1978	1977
For export	1,890	1,072	1,155	$ 38.9	$ 22.1	$ 20.9
Terry woven towels sold for further processing elsewhere (e.g., blanks)	6,846	5,413	nr	87.7	59.6	nr
Huck and crash towels	50,729	63,819	70,186	23.5	27.2	29.0
Terry washcloths	23,444	25,408	24,456	103.4	103.5	92.9
Other terry products:*						
Terry cloth sold by the yard (thous. lin. yds.)	23,733	31,878	24,980	31.5	36.0	34.2
Pot holders, aprons, dishcloths, etc.	6,006	6,739	5,479	24.3	22.6	17.0

* To the extent that terry cloth yard goods is fabricated in the production of towels and washcloths, etc., there is duplication in pertinent figures.
(p) = preliminary
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Sheets, Pillowcases & Towels (MQ23X).

Type of Finish

Quantity & Value of Shipments of Sheets, Pillowcases & Towels Percent Distribution by Type of Finish, 1977, 1978

	Sheets				Pillowcases				Terry Woven Towels			
	Quantity		Value		Quantity		Value		Quantity		Value	
	1978	1977	1978	1977	1978	1977	1978	1977	1978	1977	1978	1977
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Finish:												
White	21.5	19.9	18.7	17.6	18.4	18.5	13.2	13.8	33.1	31.6	22.6	22.2
Solid colors	9.9	8.4	10.8	8.7	9.1	7.5	9.6	7.7	37.3	34.4	44.1	40.4
Fancies	68.6	71.7	70.5	73.7	72.5	74.0	77.2	78.5	29.6	34.0	33.3	37.4

Source: Based on U.S. Bureau of Census Current Industrial Reports, Sheets, Pillowcases and Towels (MQ-23X).

SHIPMENTS

The latest source of information on shipments of home textiles, other than sheets, pillowcases and towels, is the 1977 census of manufactures, reports on which have recently been issued in advance form by the U.S. Bureau of the Census. Findings on available products for 1977, compared with the previous census covering the year 1972 are noted below.

Quantity & Value of Selected Home Textiles Detailed by Type, Shipped by All Manufacturers-1972,1977, (Including Products Made in Weaving Mills)

	Unit of Measure	Quantity (Mil.) 1977	Quantity (Mil.) 1972	Value (Mil.$) 1977	Value (Mil.$) 1972
Bedspreads, bedsets, total	units	na	46.1	$400.3	$312.5
Tufted		3.9	15.9	38.5	84.4
Woven		13.2	30.2	142.1	224.7
Jacquard woven		(D)	7.6	(D)	49.9
Other		13.2	22.6	142.1	174.8
Other, type not specified		--	--	6.9	3.4
Quilted		6.2	na	169.8	na
Blankets (bed, camp, etc., incl. electric), total	units	2.1	45.2	111.2	160.8
Woven		0.1	30.0	9.2	68.1
Cotton		(D)	8.4	(D)	13.5
Wool		0.1	2.4	9.2	13.0
Man-made fiber		(D)	19.2	(D)	41.6
Non-woven		2.0	15.2	102.0	48.3
Electric (including all types of bed coverings)		na	4.0	na	44.4
Tablecloths & napkins, mats, total	dozens	na	na	167.4	100.8
Tablecloths, total		1.9	na	103.8	63.6
Plastic, plastic-coated		1.9	na	46.6	28.7
Other		na	na	57.2	34.9
Napkins		na	na	24.5	6.7
Place mats and mat sets, including plastic		na	na	17.8	11.2
Other related articles, except lace (dresser covers, scarves, etc.)		na	na	21.3	19.3
Pillows, total	units	na	51.1	195.0	132.8
Bed pillows, total		na	30.7	108.7	70.7
Foam rubber		na	8.3	23.0	19.9
Other materials		15.8	23.2	85.7	50.8
Fancy pillows & cushions		na	20.4	85.7	61.6
Foam rubber		3.7	6.7	21.5	19.1
Other materials		na	14.1	64.2	42.5
Shower, bath curtains, including plastic-coated fabrics and all other	units	18.5	22.5	62.7	44.5
Comforters and wadded quilts		7.8	7.3	81.6	32.9

Quantity & Value of Selected Home Textiles, Detailed by Type; Shipped by All Manufacturers-1972, 1977, (Including Products made in Weaving Mills) (continued)

	Unit of Measure	Quantity (Mil.) 1977	Quantity (Mil.) 1972	Value (Mil.$) 1977	Value (Mil.$) 1972
Quilted products (except comforters & wadded quilts):	units				
Mattress protectors		20.3	12.2	$ 76.6	$ 47.9
Other, including baby pads		na	na	18.7	16.1
Slip covers:	units				
Furniture made from fabric, plastics & other material		11.5	na	55.5	52.1
Mattress & other		27.4	na	25.3	11.7
Bags (laundry, wardrobe, shoe)	units	na	na	21.4	16.7
Other Home textiles, not elsewhere classified		na	na	250.6	195.5
Curtains & draperies, not including lace, total	pairs	na	na	936.7	626.2
Window curtains, excluding lace:					
Wholly or chiefly cotton		14.9	29.4	45.6	58.8
Wholly or chiefly mad-made:					
Glass fiber fabrics		1.6	5.2	7.7	12.0
Other man-made fabrics		37.4	29.7	162.8	68.3
Other materials, including plastics		2.0	5.8	17.7	12.4
Draperies:	pairs				
Wholly or chiefly cotton		12.5	19.4	127.3	127.9
Wholly or chiefly man-made:					
Glass fiber fabrics		2.9	8.3	20.1	31.9
Other man-made fabrics		26.0	20.7	265.6	129.5
Other materials, including plastics		2.4	2.9	26.6	11.1
Curtains & draperies, not specified by kind		na	na	263.3	174.3

na = not available

Source: Bureau of the Census, 1977 Census of Manufactures, Preliminary Reports and Industry Series.

SHIPMENTS

By Geographic Area

The value of specified types of home textiles shipped by all producers by geographic area was reported as follows in the complete 1977 and 1972 censuses of U.S. manufacturers:

Value of Shipments of Specified Home Textiles
(Millions of Dollars)

	1977	1972
Bedspread & bedsets, total	$300.4	$261.2
Middle Atlantic Division		
New York	60.3	54.5
New Jersey	7.4	$5.0 to $9.9
Pennsylvania	6.0	2.0 to 4.9
East North Central Division		
Illinois	4.5	2.0 to 4.9
South Atlantic Division		
North Carolina	65.9	67.2
Georgia	67.9	62.9
Pacific Division		
California	21.4	nr
Sheets & pillowcases, not made in weaving mills, total	479.5	318.5
Middle Atlantic Division		
New York	2.0	5.3
Pacific Division		
California	3.8	nr
Towels & washcloths, not made in weaving mills, total	276.6	112.9
Middle Atlantic Division		
New York	2.8	$10.0 to $19.9

nr = not reported

Source: U.S. Bureau of the Census, Census of Manufactures, MC77-1-23E.

DISTRIBUTION

Shipments to institutional users and other non-retail markets represented over 14% of the total value of sheet shipments by U.S. manufacturers in 1978, 9.4% of pillowcase shipments, 31% of terry woven towel shipments, and 22.5% of washcloth shipments. Branded lines of sheets and pillowcases accounted for a larger share of shipments in 1978 than in 1977.

Distribution of Manufacturers' Shipments, 1977, 1978

	Based on Units							
	Sheets		Pillowcases		Terry Woven Towels		Washcloths	
	1978	1977	1978	1977	1978	1977	1978	1977
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Distribution:								
Branded retail	63.4	62.4	67.4	66.4	46.2	48.2	58.2	58.2
Private ticket retail	20.9	23.2	19.9	22.4	14.5	14.9	12.6	12.0
Institutional & other	15.7	14.4	12.7	11.2	39.3	36.9	28.6	29.8
	Based on Dollar Volume							
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Distribution:								
Branded retail	63.7	63.6	69.7	69.1	54.4	54.6	64.0	63.6
Private ticket retail	22.2	23.6	20.9	22.8	14.6	14.8	13.5	13.7
Institutional & other	14.1	12.8	9.4	8.1	31.0	30.6	22.5	22.7

Source: Based on U.S. Bureau of Census Current Industrial Reports, Sheets, Pillowcases and Towels (MQ-23X).

Distribution of home textiles by type of wholesaler has been reported by the U.S. Census Bureau in the 1977 Census of Wholesale Trade.

Distribution of Home Textiles by Type of Wholesaler, 1977

	Number of Establishments	% of Total	Sales (Mils.)	% of Total
Total wholesalers	1,041	100.0%	$3,536.6	100.0%
Merchant wholesalers	731	70.2	1,234.7	34.9
Manufacturers sales branches & offices	194	18.6	2,065.6	58.4
Agents, brokers & commission agents	116	11.1	236.3	6.7

Source: U.S. Department of Commerce, Bureau of the Census, 1977 Census of Wholesale Trade.

PRODUCER PRICE LEVELS

Producer (factory) prices for home textiles, as measured by the U.S. Bureau of Labor Statistics averaged 6.6% higher in 1979 than in 1978. In the first half of 1980, however, prices shot up over 29% compared with the average in the same period of 1979.

Producer Price Indexes For Home Textiles, 1978, 1979, First Half 1980
(Dec. 1977=100 Except Where Otherwise Noted)

	Annual Avg.		Average Jan.-June	Jan.-June	% Increase	Jan.-June
	1979	1978	1980	1979	1979/1978	1980/1979
Textile housefurnishings*	190.4	178.6	201.1	155.4	6.6%	29.4%
Bedspreads & bedsets*	192.8	182.0	208.1	187.6	5.9	10.9
Flat sheets, except crib	106.1	102.3	110.6	104.1	3.7	6.2
Fitted sheets, except crib	105.9	101.0	113.9	103.7	4.8	9.8
Pillowcases	106.8	102.0	113.2***	104.2***	4.7	8.6
Towels	131.4	123.1	141.0	128.0	7.6	10.2
Shower & bath curtains**	157.6	137.1	178.5	150.8	14.9	18.4
Window & furniture accessories	111.9	102.9	114.7	110.9	8.7	3.4
Draperies**	151.2	137.4	153.8	149.6	10.0	2.8

*Dec. 1967=100
**Dec. 1968=100
***Covers January-April period.

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Producer Price & Price Indexes.

FOREIGN TRADE

According to the U.S. Census Bureau, exports represented 9.6% of U.S. manufacturers' shipments (dollar value) of sheets and pillowcases in 1979, up from 7.0% in 1978. In towels, exports represented 6.3% in 1979, up from 5.2% in 1978.

Of total domestic supply, (manufacturers' shipments less exports plus imports) imports represented 0.5% of the total value of sheets and pillowcases and 8.2% of the towel market in 1979.

Shipments, Exports & Imports, 1978, 1979
(Quantity in 1,000 dozens; value & calculated import duty in $1,000)

	Sheets & Pillowcases		Terry Woven Towels	
	1979	1978	1979	1978
Sheets & pillowcases				
Manufacturers' shipments				
Quantity	29,461	32,087	50,255	50,235
Value f.o.b. plant	$939,324	$946,399	$746,008	$660,870
Exports of domestic merchandise				
Quantity	2,431	1,678	1,638	1,177
Value	$ 89,985	$ 65,264	$ 46,940	$ 34,271
% exports to mfrs. shipments:				
Quantity	8.2	5.3	3.2	2.3
Value	9.6	7.0	6.3	5.2
Imports for consumption				
Quantity	131	152	8,091	5,503
Value*	$ 4,354	$ 3,558	$ 62,812	$ 45,675
Calculated import duty	$ 596	$ 520	$ 7,173	$ 5,506
Apparent consumption				
Quantity	27,161	30,228	56,708	54,561
Value	$853,695	$873,287	$761,790	$672,274
% imports to apparent consumption				
Quantity	0.5	0.5	14.3	10.1
Value	0.5	0.4	8.2	6.8

*Imports equal cost, insurance and freight (c.i.f.) value plus calculated import duty.

Source: U.S. Bureau of the Census.

Imports

Following a sharp rise in the years 1977 and 1978, imports of wool blankets dropped 19% in terms of units in 1979 compared with the previous year, and were down 5.1% in value. However, imports of other types of blankets continued to gain. West Germany was the leading supplier. Developments in imports of other types of home textiles in 1979 compared with 1978 are outlined in the following table.

Imports

Imports of Specified Home Textiles by Leading Country of Origin-1979, 1978

	Unit of Measure	Quantity (Thous.) 1979	1978	% Change 1979/1978	Value (C.I.F.)* (Thous.) 1979	1978	% Change 1979/1978
Curtains & draperies, (veg. fiber), total	No.	43.0	48.2	- 10.8%	$ 305	$ 247	+ 23.5%
Blankets, wool, total	Lbs.	415.8	513.5	- 19.0	2,771	2,920	- 5.1
United Kingdom		192.6	235.5	- 18.2	1,409	1,544	- 8.7
Peru		92.7	119.4	- 22.4	410	508	- 19.3
Blankets, other, total	No.	891.0	770.3	+ 15.7	8,851	8,128	+ 8.9
West Germany		596.0	554.5	+ 7.5	6,393	6,661	- 4.0
Spain		107.0	47.9	+123.4	1,327	632	+110.0
United Kingdom		77.4	44.3	+ 74.7	451	288	+ 56.6
China (Mainland)		40.5	45.3	- 6.5	110	95	+ 15.8
Sheets & pillowcases, (veg. fiber), total	No.	1,446.3	1,770.8	- 18.3	3,877	3,101	+ 25.0
India		452.1	527.8	- 14.3	342	341	+ 0.3
China (Mainland)		438.2	563.4	- 22.2	1,001	1,081	- 7.4
Pakistan		165.8	--	--	86	--	--
United Kingdom		163.8	87.2	+ 87.8	1,030	509	+102.4
Bedding, n.e.s., total	Lbs.	3,913.4	5,279.2	- 25.9	15,305	17,449	- 12.3
India		1,530.4	2,104.9	- 27.3	4,228	4,714	- 10.3
Mexico		595.1	379.4	+ 56.8	1,849	1,302	+ 42.0
Singapore		261.5	126.4	+106.9	1,077	698	+ 54.3
Korean Republic		232.4	883.7	- 73.7	891	3,491	- 74.5
Towels, cotton shop, total	No.	92,089.8	98,334.0	- 6.3	8,432	8,137	+ 3.6
Hong Kong		53,935.8	66,402.5	- 18.8	5,152	5,589	- 7.8
China (Mainland)		17,297.5	8,750.0	+ 97.7	1,161	505	+129.9
Towels, (veg. fiber), total	No.	117,747.9	92,085.0	+ 27.9	59,394	51,224	+ 15.9
Pakistan		48,424.2	28,747.5	+ 68.4	12,983	6,898	+ 88.2
India		30,722.7	24,864.3	+ 23.6	10,669	7,187	+ 48.4
Hong Kong		14,099.4	15,730.1	- 10.4	7,632	9,783	- 22.0
Brazil		4,010.3	5,054.6	- 20.7	8,983	10,635	- 15.5
Tablecloths & napkins, total	Lbs.	4,999.3	3,801.9	+ 31.5	12,340	8,688	+ 42.0
Pakistan		1,164.5	688.8	+ 69.1	2,173	915	+137.5
Hong Kong		1,242.0	881.2	+ 40.9	2,867	1,647	+ 74.1
India		701.7	246.3	+184.9	1,560	455	+242.9
Korean Republic		537.6	579.7	- 7.3	1,162	782	+ 48.6

*C.I.F. Import Value--the value of imports at the first port of entry in the United States based on the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation.

n.e.s. = not elsewhere specified

Source: U.S. Bureau of the Census, U.S. Central Imports, Report FT135.

CONSUMER EXPENDITURES

An analysis of National Income & Product Accounts by the Bureau of Economic Analysis, U.S. Department of Commerce, which drew on findings in the 1972 Census of Retail Trade, has yielded data on personal consumption expenditures for home textile products. In the following table, projections have been compiled based on figures reported by the Bureau for broader classifications of personal spending in 1979.

The figures reflect retail sales, and do not include the contract or institutional market. The value of the market at retail is currently estimated at about $11 billion.

Personal Consumption Expenditures For Home Textiles
(In Millions of Dollars)

	1972	Projected 1979
Home textiles, total	$4,770	$11,002
Blankets	131	355
Electric blankets, bed coverings	82	191
Bedspreads, bedsets	536	1,251
Comforters, quilts	37	86
Sheets, pillowcases	762	1,776
Mattress protectors, pads, etc.	113	263
Pillows	230	536
Towels, washcloths	619	1,443
Shower curtains	77	180
Tablecloths, napkins, related mdse.	293	683
Slip covers	111	258
Curtains, draperies	971	2,263
Window shades, blinds, etc.	208	485
Mops, dusters	71	165
Bags (laundry, wardrobe, shoe)	29	67
Other household textiles	500	1,000

CONSUMER PRICES

Prices at retail for textile house furnishings, as measured by the Bureau of Labor Statistics, averaged 6.7% higher in 1979 than in 1978, but in the first six months of 1980 rose at an average close to 8%.

Consumer Price Indexes for Home Textiles, 1978, 1979, First Half 1980
(Dec. 1977=100 Except Where Otherwise Noted)

	Annual Average		Jan.-June Avg.		% Increase	
	1979	1978	1980	1979	1979/78	Jan.-June 1980/79
Textile house furnishings*	173.9	162.9	185.2	171.6	6.7%	7.9%
Household linens	105.7	100.2	112.4	104.8	5.5	7.3
Curtains, draperies, slip-covers, sewing materials	103.8	103.0	118.7	109.2	0.8	8.7

*Dec. 1967=100

Source: U.S. Bureau of Labor Statistics.

SALES BY TYPE OF RETAIL OUTLET

Detailed information on retail sales, analyzed by merchandise categories, is compiled every five years by the U.S. Bureau of the Census in the Census of Retail Trade.

The most recent census, covering operations in 1977, showed that under the classification of home textiles, the sales volume distribution for Window & Furniture Covering outlets was 58.5% for department and variety stores, and 86.1% for department, variety, furniture, and drapery, curtain & upholstery stores.

Department and variety stores accounted for 84.8% of Domestics & Closet Accessories outlet sales, while department, variety, furniture, and drapery, curtain & upholstery stores amounted to 86.6%.

SALES BY TYPE OF RETAIL OUTLET

Reported Sales of Home Textiles & Related Merchandise by Store Type, 1977
(Stores with Payrolls Only)

	Curtains Draperies & Dry Goods, Total#		Window Furniture Coverings##		Domestics & Closet Accessories###	
	Number of Stores*	Sales (Mil.$)	Number of Stores*	Sales (Mil.$)	Number of Stores*	Sales (Mil.$)
Total	81,734	10,010.8	na	na	na	na
Department Stores**	8,807	4,725.8	7,950	1,396.9	8,523	2,515.9
Variety stores	13,262	730.2	10,713	127.3	12,573	226.6
Furniture stores	6,786	241.4	6,187	209.2	954	27.5
Floor covering stores	2,129	79.8	2,109	76.6	80	2.1
Drapery, curtain & Upholstery stores	4,427	560.6	4,427	512.4	627	31.9
Other home furnishings stores	1,753	242.5	738	44.3	1,567	191.8
Sewing, needle & piece goods stores	10,064	1,755.0	1,181	63.1	264	10.9
Other	30,751	1,231.0	na	na	na	na
Mail order	3,755	444.6	3,630	177.2	3,618	229.0

na = not available
*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.
**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within the stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses.
#Includes curtains, draperies, bedsheets, blankets, linens, piece goods, patterns, laces, trimmings, notions, closet accessories, blinds, and window shades. The following are subdivisions of this department.
##Window and furniture coverings (ready-made, custom-made and piece goods).
###Includes bed and table coverings, towels and closet accessories.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

Department Stores

According to the National Retail Merchants Association, the typical department store with sales over $1 million reported an increase in 1979 of 5.5% over the previous year. NRMA reports nine departmental breakouts in home textiles. Of these, two categories--linens & domestics and table linens & other table coverings--registered the greatest median increase in sales (10.9%), while readymade curtains, shades, blinds & hardware, the least (1.7%). On the average, linens & domestics also contributed the highest percent of store sales (3.3%).

Typical markons ranged from 45.0% to 50.3%. Markdowns averaged between 5.8% and 10.5%.

Stock turns, registering 3.1 for total upstairs stores, recorded between 1.4 and 2.8 for all categories of home textiles.

SALES BY TYPE OF RETAIL OUTLET

Department Stores

Selected Typical (Median) 1979 Merchandising & Operating Results
In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store	Mattress Pads & Covers	Window & Furniture Coverings
Net sales, % change from last year	5.5	3.7	2.3
Sales, % of total store sales	89.2	0.4	1.0
Sales, % of merchandising division	--	6.0	19.5
Gross margin, % of sales including cash discounts	42.2	45.0	43.6
Cumulative markon, %	48.0	48.5	48.3
Markdown, retail, % of sales	13.2	7.3	9.2
Stock turns	3.1	1.9	1.7
Returns, % of gross sales	8.0	4.5	13.5
$ Sales per sq. ft. of selling space	91.6	66.3	48.5
Sales promotion, % of sales	3.0	3.2	3.7
Salespeople's salaries, % of sales	7.7	9.4	10.5

	Ready Made Draperies & Slip Covers	Ready Made Curtains, Shades, Blinds, Hdware.
Net sales, % change from last year	2.9	1.7
Sales, % of total store sales	0.8	0.7
Sales, % of merchandising division	13.5	9.4
Gross margin, % of sales including cash discounts	44.7	40.7
Cumulative markon, %	50.3	48.1
Markdown, retail, % of sales	10.5	6.2
Stock turns	1.6	1.4
Returns, % of gross sales	--	--
$ Sales per sq. ft. of selling space	48.0	50.7
Sales promotion, % of sales	4.3	4.3
Salespeople's salaries, % of sales	--	--

	Linens & Domestics	Towels	Sheets & Pillowcases
Net sales, % change from last year	10.9	10.3	7.6
Sales, % of total store sales	3.3	0.9	0.6
Sales, % of merchandising division	61.9	16.2	11.8
Gross margin, % of sales including cash discounts	43.0	45.9	44.7
Cumulative markon, %	46.5	47.9	47.8
Markdown, retail, % of sales	7.0	5.8	6.5
Stock turns	2.4	2.7	2.5
Returns, % of gross sales	7.1	4.9	5.4
$ Sales per sq. ft. of selling space	94.6	119.3	109.4
Sales promotion, % of sales	3.7	3.4	4.2
Salespeople's salaries, % of sales	7.6	7.4	7.4

(continued)

Department Stores (continued)

Selected Typical (Median) 1979 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Blankets, Comforters & Bed Pillows	Table Linens & Other Table Coverings
Net sales, % change from last year	13.3	10.9
Sales, % of total store sales	0.8	0.8
Sales, % of merchandising division	15.6	18.1
Gross margin, % of sales including cash discounts	43.8	42.6
Cumulative markon, %	46.9	45.0
Markdown, retail, % of sales	6.8	7.4
Stock turns	2.8	2.5
Returns, % of gross sales	10.6	9.2
$ Sales per sq. ft. of selling space	118.8	83.3
Sales promotion, % of sales	4.7	3.5
Salespeople's salaries, % of sales	7.4	7.5

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1980 Edition.

According to data compiled by Discount Merchandiser, nearly one-third of all linens, domestics and fabric purchases were made in discount stores during 1978 and 1979, while approximately 20% were from department stores.

Percent of Linens, Domestics & Fabric Purchases by Type of Outlet—1978 & 1979

	1979	1978
Discount stores	31.9%	30.8%
Department stores	20.5	20.3
Misc. general merchandise stores	12.9	12.4
Variety stores	10.7	10.8
Drapery, fabric stores	9.8	9.7
Family apparel stores	5.9	7.3
Mail order	5.2	5.7
Furniture stores	3.1	3.0

Source: Discount Merchandiser, May 1978 and 1979 editions.

Curtain, Drapery & Upholstery Stores

According to the 1977 census of retail trade, there were a total of 11,416 stores (individual business locations) classified as curtain, drapery and upholstery stores operating in 1977, with total sales of $772,199,000. In the 1972 census, findings were reported only for curtain, drapery stores with payrolls. Comparisons in this respect with 1977 findings are noted below.

RETAIL SALES BY TYPE OF OUTLET

Curtain, Drapery & Upholstery Stores

Curtain, Drapery & Upholstery Stores, 1972, 1977

All Stores, 1977		Stores With Payroll				
		Number		Sales (mil.$)		
Number	Sales (mil.$)	1977	1972	1977	1972	% Increase
11,416	$772.2	4,427	4,140	$648.4	$478.9	35.4

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade (RC77-S-1).

Of the total count in 1977 covering curtain, drapery and upholstery stores, 10,061 stores were in operation the entire year. While most of the outlets were small, with volume under $100,000, the 20.4% of the stores with volume of $100,000 or more controlled almost 75% of total sales in this specialty store classification.

Distribution of Curtain, Drapery Upholstery Stores
By Sales Volume Group, 1977

	Stores		Sales	
	No.	%	Mil.$	%
Total stores in operation entire year	10,016	100.0%	$717.2	100.0%
Annual sales--				
$1.0 mil. & over	24	0.2	37.6	5.2
$100,000-$999,999	2,030	20.2	494.6	69.0
Under $100,000	8,007	79.6	185.0	25.8

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade (RC77-S-1).

CONSUMER SALES TRENDS BY PRODUCT

NPD Research Inc. is the source for a specialized NPD Textile and Apparel Market Index, which is compiled on the basis of an on-going monthly diary tracking the purchases of 6,500 nationally representative families.

Detailed information based on NPD Research is covered in Home Fashions Textiles, a monthly trade magazine published by Fairchild Publications. Consumer sales trends for the latest available 12 month period, in terms of units and dollars, based on NPD panel reports, are noted below, followed by information reported on specific types of home textiles.

CONSUMER SALES TRENDS BY PRODUCT

Consumer Sales Trends For Home Textiles
Percent Change, 12 Months Ending March—1980/1979

Category	Units	Dollars	Average Price
Sheets	+ 3.6%	+14.9%	+11%
Bath towels	+ 2.5	+17.4	+14
Other bathroom towels	+22.4	+25.1	+ 2
Blankets	+17.3	+38.6	+18
Bedspreads	- 4.5	+ 6.1	+11
Comforters	+ 4.3	+ 9.9	+ 5
Pillows	-14.3	- 4.0	+12

Source: Home Fashions Textiles based on NPD Research (July/Aug. 1980).

Sheets

Based on information reported in purchase diaries maintained by the 6,500 representative households throughout the country who are members of the NPD Consumer Panel, the percent of unit purchases of sheets priced under $4.00 dropped from 48.9% in 1978 to 41.4% in 1979, reflecting price increases at the retail level, and trading up.

Along with this development, consumers reported a greater percentage of purchases in department stores, somewhat less in discount stores, chain and mail order houses.

Sheet Purchase Distribution by Price Point, 1978, 1979
(Based on Units)

	1978	1979
Total reported purchases	100.0%	100.0%
Price points:		
Less than $1.99	7.7	5.5
$2.00 - $2.99	19.6	15.7
$3.00 - $3.99	21.6	20.2
$4.00 - $4.99	23.5	19.8
$5.00 - $5.99	8.6	12.8
$6.00 - $6.99	5.5	7.6
$7.00 - $7.99	3.8	5.4
$8.00 & over	9.7	13.0

Sheet Purchase Distribution by Store Type, 1978, 1979
(Based on Units)

	1978	1979
Total reported purchase	100.0%	100.0%
Department store	26.0	28.5
Discount store	34.3	33.6
Specialty	0.8	0.1
Chain & mail order	30.5	27.2
Other	8.4	10.6

Source: Home Fashions Textiles based on NPD Research (Nov. 1979).

Blankets

NPD Research data on blanket purchases in the 12-month period ending in September 1979 compared with the same 1978 period showed the stimulus of lowered thermostats. This was the best-performing home textile category in that period. Unit purchases of blankets were up 8%, while dollar expenditures rose 15%.

Electric blankets represented 15.6% of reported blanket purchases in the 12-month period ending September 1979, down from 20.4% in the comparable period a year earlier, based on unit purchases.

Blanket Purchase Distribution by Price Point, 1978, 1979
(Based on Units)

	(12 Months Ending September) 1979	1978
Total reported purchases	100.0%	100.0%
Price points:		
$8.00 & under	54.9	54.3
$8.01 - $12.00	21.7	20.0
$12.01 - $16.00	4.8	11.8
$16.01 - $21.00	9.0	5.5
$21.01 - $26.00	5.8	5.7
$26.01 & over	3.8	2.7

Blanket Purchase Distribution by Store Type, 1978, 1979
(Based on Units)

	(12 Months Ending September) 1979	1978
Total reported purchases	100.0%	100.0%
Department stores	18.5	24.2
Major chains & mail order	34.3	35.4
Discount stores	35.3	29.1
Specialty stores	--	0.3
Other stores	11.9	11.0

Source: Home Fashions Textiles, based on NPD Research (Feb. 1980).

CONSUMER SALES TRENDS BY PRODUCT

Comforters

According to NPD Research, dollar volume in comforters rose 4% and unit volume 2% in 1979 compared with 1978. November, December and March were the peak months for purchases, according to the NPD's Panel, accounting for 12.7%, 11.9% and 10.4% in respective unit purchases.

The majority of reported comforter purchases occurred at the lower end of the pricing scale. In 1979, 24.6% were at less than $14.00; for 1978, that figure was 26.7%. High-end sales--imported comforters of natural fiber fill and quality craftmanship--recorded share of market at retail of 3.8% in 1979 and 3.5% in 1978. The greatest drop in sales between 1978 and 1979 was the $22.00-$25.99 range where 11.6 points were lost; the greatest increase was in the $26.00-$29.00 range.

Department stores accounted for the bulk of reported purchases (31.6%), followed by chain and mail order houses (27.1%).

Comforter Purchase Distribution by Price Point, 1978, 1979
(Based on Units)

	1979	1978
Total reported purchases	100.0%	100.0%
Price points:		
Under $14.00	24.6	26.7
$14.00 - $17.99	14.0	14.9
$18.00 - $21.99	18.3	11.8
$22.00 - $25.99	9.1	20.7
$26.00 - $29.99	13.8	7.3
$30.00 - $37.99	8.3	7.8
$38.00 - $47.99	5.8	5.5
$48.00 - $55.99	2.4	1.8
$56.00 & over	3.8	3.8

Comforter Purchase Distribution by Store Type, 1978, 1979
(Based on Units)

	1979
Total reported purchases	100.0%
Department store	31.6
Discount store	23.3
Variety	3.4
Chain & mail order	27.1
Other	14.6

Source: Home Fashions Textiles based on NPD Research (Sept. 1980).

CONSUMER SALES TRENDS BY PRODUCT

Curtains

A nationwide survey among 45 leading department and discount stores on their curtain and drapery operations developed information on sales by price point in 1979. In discount stores, about 79% of the curtain business was at prices under $10 compared with 47% of department store sales of curtains at this price level.

The stores reported that styling was the most important consideration for their customers in buying curtains, followed by price.

Curtain Sales Distribution by Price Point, 1979

	Discount Stores	Department Stores
Total sales	100.0%	100.0%
Price points:		
Under $5.00	39.4	5.3
$5.00 - $9.99	39.5	20.1
$10.00 - $14.99	12.3	22.0
$15.00 - $19.99	4.9	16.1
$20.00 - $24.99	1.9	16.9
$25.00 - $29.99	1.6	10.1
$30.00 - $39.99	0.3	5.8
$40.00 & over	0.1	3.7

Ranking of Consumer Priorities in Curtain Purchases
(In Department Stores & In Discount Stores)

	Department Stores	Discount Stores
Styling	1	1
Price	2	2
Texture of fabric	3	4
Durability of fabric	4	3
Fiber content of fabric	5	5
Ease of installation	6	7
Energy-saving characteristics	7	6
Brand name	8	9
Flammability	9	8

Source: Home Fashions Textiles, (March 1980).

CONSUMER SALES TRENDS BY PRODUCT

Draperies

Approximately 20.0% of all department store drapery dollar sales are within the $20.00-$24.99 price range, while 55.5% of all discount store sales are under $15.00. In drapery fabrication, open weave, malimo styles in 1979 represented 34.6% of department store sales and 27.6% of discount. In closed weave, antique satin accounted for 70.0% of sales in department stores in 1979 and 41.2% for discounters, according to the survey among 45 stores by Home Fashions Textiles.

Draperies Sales Distribution by Price Point, 1979

	Discount Stores	Department Stores
Total sales	100.0%	100.0%
Price points:		
Under $15.00	55.5	13.3
$15.00 - $19.99	24.5	13.3
$20.00 - $24.99	9.2	19.7
$25.00 - $29.99	5.0	10.8
$30.00 - $39.99	3.9	15.4
$40.00 - $49.99	1.3	9.6
$50.00 - $69.99	0.6	10.0
$70.00 & over	--	7.9

Ranking of Consumer Priorities in Drapery Purchases
(In Department Stores & In Discount Stores)

	Department Stores	Discount Stores
Styling	1	2
Texture of fabric	2	5
Energy-saving characteristics	3	1
Price	4	4
Durability of fabric	5	3
Ease of installation	6	6
Fiber content of fabric	7	7
Brand name	8	9
Flammability	9	8

Source: Home Fashions Textiles, (March 1980).

Draperies (continued)

Retail Sales of Ready-Made Draperies by Type - 1979

	% of Units Sold
Total sales	100.0%
Closed weave	52.9
Unlined	13.1
Fabric-backed	4.1
Foam-backed	35.7
Open weave	31.2
Unlined	11.1
Self-lined	8.8
Fabric-backed	11.3
Shears	15.9
Pinch pleat	4.7
Rod pocket	11.2

Source: Home Fashions Textiles, (March 1980).

Table Linens

According to a survey among department and discount stores by Home Fashions Textiles, the tablecloth business lost ground to placemats and other tabletop categories in 1979. Department stores estimated tablecloth sales dropped from 55% in 1978 to 49% of table linen sales in 1979, while placemat sales increased from 21% to 24%. Napkins represented 17.1% of reported sales.

In discount stores, tablecloth sales were down from two-thirds of total sales in 1978 to 56.8% in 1979. Placemat sales held steady at just over 26%; napkins were up to 12%.

The best-selling tablecloth by size in discount stores is 52" x 70", according to 61.3% of respondents, followed in mentions by the 72" round, (17.3%). The 60" x 90" size is the best-seller in department stores, according to 38.4%, followed in mentions by the 52" x 70" size (26.3%). (Home Fashions Textiles, July/August 1980).

Kitchen Towels

The survey conducted by Home Fashions Textiles among department stores and discount stores showed the best-selling price line for kitchen towel sales was $2.51 to $3.00, accounting for close to 42% of unit volume. In discount stores, sales were concentrated in the $1.50 to $2.00 bracket (65% of unit sales).

(continued)

CONSUMER SALES TRENDS BY PRODUCT

Kitchen Towels (continued)

Kitchen Towel Sales Distribution by Price Point, 1979

	Department Stores	Discount Stores
Total sales	100.0%	100.0%
Price points:		
Less than $1.50	8.4	11.7
$1.50 - $2.00	8.3	64.7
$2.01 - $2.50	29.2	17.6
$2.51 - $3.00	41.7	5.9
More than $3.00	12.5	5.9

Source: Home Fashions Textiles, (June 1980).

CONSUMER BUYING HABITS

In October 1979 House & Garden had a survey conducted among their subscribers by Scarborough Research Corp. to develop information on home furnishings buying. The report reflected answers from 4,477 subscribers in total, not all of whom received the same questionnaire.

The percent of House & Garden subscribers who had purchased home textiles in the past 12 months, in total and by age group, was reported as follows, together with estimates on the percent of all U.S. households who purchased, according to Scarborough Research Corp.

Purchasers & Home Textiles

	All U.S. Hsholds.	H & G Total	Age Groups 20-29	30-39	40-49	50 & over
Total respondents		100%	100%	100%	100%	100%
Purchasers of -						
Linens		81	78	83	83	79
Bath, bed	40	72	70	75	77	69
Table linens		39	41	41	38	37
Blankets	19	30	28	29	36	29
Curtains, draperies	18	47	53	48	46	44

Place of purchase of linens, curtains and draperies, reported by House & Garden Subscribers was as follows:

	Linens	Curtains, Draperies
Total respondents who purchased each type	100%	100%
Store type:		
Department stores	86	62
Discount stores	14	6
Furniture stores	3	8
Other store types	8	29

Note: Columns add to more than 100% due to multiple responses.

CONSUMER BUYING HABITS

In February 1979 Seventeen Magazine reported on a survey based on 1,009 responses from their consumer panel of teenage girls (ages 13 - 19 years). From the 82.7% who have their own room at home, the following data on home textile furnishings was developed.

	Bedspreads	Curtains	Draperies
Furnishings in room (Base: Girls having room at home)	94.1%	81.2%	18.9%
When furnishings were acquired: (Base: Girls having item in room)			
Past month	6.3%	3.3%	5.7%
6 months - 1 year	23.5	18.8	9.1
1 - 2 years	29.9	25.5	23.9
2 or more years	35.6	44.8	47.2
How furnishings were acquired (Base: Girls having item in room)			
Personally bought	34.1%	33.7%	30.7%
Gift	42.7	34.5	35.2
Passed down from other family member	9.8	12.2	13.6
Furnishings expect to acquire for room (Base: Girls expecting to decorate room)	55.5%	41.5%	11.8%
Selector of furnishings for room (Base: Girls expecting to purchase item)			
Girl, herself	55.2%	46.1%	43.1%
Mother	7.1	9.4	7.8
Both	31.5	38.9	39.2
Other	4.1	1.7	7.8

Source: Seventeen Magazine, "Home Furnishings Survey," (February 1979).

FAIRCHILD FACT FILES AVAILABLE FOR 1980

CONSUMER MARKET DEVELOPMENTS: Summarizes key economic trends and indicators, particularly those having a direct relationship to the consumer market for durable and nondurable goods. A wide variety of sources are drawn on to present an overview of economic developments and market trends, as well as consumer market dynamics, including trends by age group, educational and income levels, buying patterns and outlook.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (December): Covers the latest available annual sales of department stores throughout the country listed by buying headquarter location. Includes data on number of outlets covered in reported sales totals, as well as information on sales for many branch and main stores. Some leading specialty operations are also included in the listing by location. Other listings: department store operations with sales of $50 million or more reported in order of volume, major conglomerates with general merchandise store or apparel store divisions, and department stores operated by major department store corporations.

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HOME ELECTRONICS: A statistical summary of the consumer electronics market. Product classifications include home entertainment and related products (television sets, radios, stereos, audio and video systems, video games, etc.), as well as home security and fire protection devices and calculators. Data presented at the manufacturer, retailer, and consumer levels.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

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MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S CLOTHING, TAILORED SPORTSWEAR AND RAINWEAR: Manufacturer level profiled by production, value of shipments, employment, size of firms, more. Imports from key foreign sources by unit and dollar value covered, and data is also presented on retail sales and merchandising.

MEN'S FURNISHINGS AND CAREER/WORK WEAR: Includes information on number of manufacturers, production and shipment figures, geographical distribution, size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, and advertising patterns.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S, WOMEN'S, AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

MEN'S, WOMEN'S AND CHILDREN'S FOOTWEAR: Findings in a 1980 survey on consumer purchases of footwear are an important new feature of this FACT FILE. Also included are data on major trends in the industry in relation to imports, domestic production and shipments, as well as developments at the retail level.

SOFT SURFACE FLOOR COVERINGS (November): Trends in the number of manufacturers, in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE-APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics, as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills. Also: exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditure data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type, and advertising expenditures by major producers.

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WOMEN'S DRESSES (January 1981): Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR AND DAYWEAR: Data on production and shipments, tracing market shifts in response to fashion changes. Also: imports, retail trends and merchandising ratios, and data on consumer buying habits.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing such as the designer label.

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